

INSTALL THE SAVINGS

Statewide Mass Market Campaign

**Delivering critical
energy efficiency
information to consumers**

at the **Right Place**
at the **Right Time**
from a **Trusted Source**

INSTALL THE SAVINGS

A Statewide Campaign Promoting Permanent Energy Savings

PROPOSED BY Energy Solutions

Linda Brandon Design

Home Energy Magazine



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1. Executive Summary

Install the Savings Statewide Mass Market Campaign

ENERGY SOLUTIONS, together with Linda Brandon Design and *Home Energy* Magazine, is pleased to submit a statewide marketing proposal to the California Public Utility Commission. Our team combines extensive knowledge of energy efficiency with a graphic design firm that has specialized in energy efficiency for the last five years but builds on decades of experience working with large clients. Our proposed program, *Install the Savings*, is an effective complement to a Statewide Flex Your Power (FYP) program that directly targets customers.

Install the Savings will leverage tens of thousands of salespeople and contractors throughout the state as key information sources that lead consumers from awareness to action by intervening at the critical time in the purchasing decision process when specific models and features are chosen. Imagine having an "energy angel" whispering in the customer's ear and urging them to buy a condensing furnace at the moment they are making the decision. Contractors and salespeople are in a strategic position to promote energy efficiency. One salesperson might sell 50 furnaces in a year, whereas the average homeowner only buys a furnace every 15 years and in any case is less likely to understand what factors determine energy use. Additionally, there are orders of magnitude fewer salespeople and contractors than customers and it is much easier to equip those professionals with highly detailed technical expertise and information on equipment and incentive programs.

Install the Savings recognizes the importance and value of the Commission's concept of broadly targeted mass media and will work closely with FYP to maximize impact. Wide ranging, FYP-type campaigns can be successful in raising general awareness of energy efficiency issues and influencing customer attitudes toward energy efficiency. This helps set the foundation for success for most other programs in the PGC portfolio. However, Commission-authorized market research points to three barriers that curtail the ultimate energy savings impacts of a FYP program—three barriers that ***Install the Savings*** program will address:

- 1.) The majority of consumers are susceptible to attitude and awareness influences, but for most measures are not susceptible to any specific calls to action from the FYP advertising due to timing. Most consumers are not currently "in the market" for a given measure at any given time. Thus, the message may instigate savings in only a limited number of cases, even if fairly specific and actionable messages are deployed.
- 2.) Commission research shows that **consumers strongly prefer to obtain measure-specific energy efficiency information from the salesperson or contractor**...a preference that is approximately twice that of the next favorite source, utilities. Thus, FYP is not sufficiently leveraging the primary information channel used by consumers when they are "in the market" for the measure.
- 3.) Commission research also shows that consumers dramatically overestimate the efficiency of their homes and equipment. A FYP-type campaign cannot easily address this incorrect self-assessment and thus leaves too few consumers feeling that they themselves need to act on the message, even though they often agree with it. Salespeople and contractors are best positioned to help consumers understand what the real potential is for each situation.

Install the Savings tackles each of these three barriers directly. It will use various broadly targeted marketing tactics—direct promotion, advertising, incentives hotline, and the web— to drive tens of thousands of knowledgeable salespeople and contractors throughout the state into service as "relay channels" for mass-marketing messages. Salespeople and contractors are the market actors that consumers turn to when choosing equipment. These are the same market actors that specify the equipment actually purchased and in many cases even install it in the customer's house. For this reason, Install the Savings complements Flex Your Power's mass market outreach to consumers by working closely with the ten of thousands of salespeople and contractors that help customers choose specific models and features. Install the Savings will use customized outreach tailored to the different suppliers and contractors providing various types of equipment (e.g., lighting versus furnaces versus refrigerators).

The strength of this proposal comes from ENERGY SOLUTION's years of experience with energy efficient technologies, trade allies, market segmentation and targeting strategies and Linda Brandon Design's creative design and energy efficiency marketing materials development skills. The program also draws on *Home Energy Magazine's* 18 years of experience and trusted presence as a national home performance magazine. In short, our team possesses a unique combination of experience in utilizing creative informational and marketing tools to stimulate adoption of energy efficiency.

2. Budget

The total budget for this project is \$913,300. The Budget Summary, below, provides a breakdown of costs in the format prescribed in the Commission's Attachment 2.

Table 1. Budget Summary for Marketing/Outreach Proposals

Item	Total Cost	% of Total
Administrative Costs		
Labor	\$ 11,114	1%
Benefits	\$ 48,790	5%
Travel/Conference/Training	\$ —	0%
Reporting/Tracking/Development	\$ —	0%
Materials and Handling	\$ —	0%
Overhead and General Administrative costs	\$ 104,940	11%
Subcontractor Administrative costs	\$ 136,607	15%
<i>Total Administrative Costs</i>	\$ 301,451	33%
Marketing/Advertising/Outreach Costs		
Promotional campaign—direct mail: 40,000 vendors/ contractors; 50 different pieces	\$ 352,050	39%
Residential magazine and trade journal outreach: Advertisement, articles, web updates	\$ 123,097	13%
Incentives Hotline: Toll free number staffed 1200 hours	\$ 37,860	4%
<i>Total Marketing, Advertising, Outreach Costs</i>	\$ 513,007	56%
Evaluation, Measurement, Verification Costs		
Labor	\$ 2,781	0%
Benefits	\$ 1,276	0%
Travel/Conference/Training	—	0%
EM&V Reporting Costs	\$ 40,000	4%
Materials and Handling	—	0%
Overhead and General Administrative costs	\$ 2,744	0%
<i>Total Evaluation, Measurement and Verification Costs</i>	\$ 46,801	5%
Other Costs		
Profit	\$ 52,015	6%
Financing Costs	—	0%
<i>Total Other Costs</i>	\$ 52,015	6%
Budget Grand Total	\$ 913,274	

The above budget is a bottom-up estimate to produce the quantities and types of materials described in section 5.

3. Proposed Marketing Campaign

Install the Savings proposes to address directly the primary barrier to market-wide energy efficiency improvements: the lack of specific knowledge by customers about energy efficiency opportunities and choices. Customers view energy efficiency as a desirable attribute, but generally do not know how to follow through with that desire and pick the right equipment that delivers the savings. Additionally, energy efficiency is just one of many factors a customer considers when making a purchase decision.

Salespeople and contractors on the other hand are a much smaller group, have more technical expertise, and have an extreme interest in better understanding how to sell their products. Install the Savings will target salespeople and contractors throughout the state in an aggressive marketing campaign to ensure that energy efficiency stays at the forefront and that it is promoted to each customer.

Salespeople and contractors are the source that consumers most often rely on for help choosing equipment. In 1999, the California Board for Energy Efficiency (CBEE) asked California residential customers "How would you go about finding out about energy efficient...". Their responses:

Table 2. How residential customers find out about energy efficient products

Type of mailer	Central Air	Refrigerators	Windows	Clothes Washers	Fixtures
Ask salesperson, contractor	49%	47%	55%	55%	50%
Ask utility	25%	17%	23%	20%	33%
Ask friends, family	22%	11%	9%	6%	13%
Look on internet	15%	21%	9%	30%	4%
Look for energy efficiency label/tag	3%	32%	0%	13%	3%
Look at manufacturer literature	2%	0%	2%	1%	0%
Ask state agency	0%	0%	1%	0%	1%
Look at other sources	5%	12%	12%	4%	9%
Don't know	10%	7%	8%	22%	7%

Source: CBEE Baseline Study on Public Awareness and Attitudes Toward Energy Efficiency, Final Draft, February 17, 1999, Exhibit 3-5.

As this study confirms, residential customers find information about energy efficient products from a few sources, but the majority of the information comes from the salesperson or contractor. In the course of shopping around for a new appliance or other home product, the customer is likely to be most impressed—and influenced—by a knowledgeable salesperson. The confidence that knowledge inspires creates an environment in which the customer feels comfortable deciding to pay for the benefits efficiency brings. The salesperson, vendor or contractor becomes a spokesperson for efficiency, rather than just for a particular product, and this makes all the difference. Increasing vendor and contractor awareness about energy efficient products, energy and cost savings resulting from those products and local and statewide rebates available for them is therefore invaluable in promoting statewide energy efficiency improvements.

While many contractors and vendors are knowledgeable about energy efficiency options, barriers continue to exist in this population. Such barriers include:

- Lack of technical knowledge about energy efficiency options, particularly the newer technologies
- Perception that customers do not demand or value energy efficiency options
- Lack of knowledge about financial incentives and other tools available to help market energy efficiency to their customers

Install the Savings will address these barriers and use standard marketing techniques to ensure that energy efficiency stays on the front burner. More importantly, the Install the Savings program turns into an opportunity the fact that 50% of customers look to their salesperson and contractor for information about energy efficient products.

For example, the marketing campaign will reach vendors with rebate and technical information specific to their customer group. HVAC contractors will receive information on available incentives and on condensing furnaces and high EER air conditioners. Lighting retailers might need a pitch on recessed can CFL fixtures and other efficient lighting systems and components appropriate for the residential market. Appliance sellers need individual or combined pieces on clothes washers, dishwashers, refrigerators, and water heaters. The Energy Star brand will be promoted where appropriate across all products. Building shell measures such as window replacement and insulation will be highlighted where appropriate as well. The program will leverage *Home Energy's* unique access to salespeople and installers as well as consumers.

4. Media Outlets

The Flex Your Power campaign during Summer 2001 demonstrated that television and radio are effective in providing general information about energy efficiency. As awareness takes hold—as it has in California today—customers naturally desire further information relevant to them. For example, one might wonder "My windows are old and drafty—what are my options?" "This AC unit does not seem to have the punch it once did—does it need replacing or just a tune-up?" By awakening this curiosity in millions of individuals, FYP creates a window of opportunity with each customer during which he or she is open to pro-efficiency action, and more importantly for us here, investment. By seamlessly leveraging the FYP groundwork, we will present several complementary sources of information, with follow-up where possible and appropriate, that tend to corroborate key pieces of information and increase the consumer's comfort level. Install the Savings acts to "close the deal" by making sure that relevant information and encouragement is there to coach the consumer through the process to finally make the energy-efficiency choice.

DIRECT PROMOTION

The broad message disseminated in the Flex Your Power campaign can be reinforced and taken to the next level with more targeted information provided through the direct mail channel. The proposed targeted direct mail campaign will provide appropriate information on incentive programs and new technologies available to vendors and their customers. The vendor types that we propose to target include:

Table 3. Direct Promotion

Sector with direct customer contact	SIC Code
General Contractor - single family houses	1521
General Contractor - residential building	1522
Plumbing, heating and air conditioning	1711
Insulation	1742
Electric and windows – retail	5211
Lighting Fixtures, Retail	5719
Homebuilders	1521-12
Air Conditioning Contractors And Systems	1711-17
Duct Systems- AC And Heating	1711-24
Insulation Cold And Heat	1742-05
Energy Conservation Prods-Wholesale	5033-06
Energy Conservation Prods-Retail	5211-36
Hardware Retail	5251-04
Appliances-Household-Major-Dealers	5722-02
Hardware Consultants	7379-01
Family Homes	8351-01
Home Design And Planning Service	8712-13

Our three years of experience producing direct mail marketing for the PG&E Express Efficiency program has taught us a great deal that we can bring to bear to ensure successful results in this program. Audiences are most likely to read carefully tailored graphics that communicate quickly and precisely. A quality piece engenders confidence and trust. We believe in reducing costs whenever feasible, by sharing art and printing costs between several targeted audiences and by building on a previously designed piece to communicate additional information. It is also critical to reinforce messages repeatedly by establishing a recognizable look and feel that identifies each subsequent piece as related to the previous ones, while providing updated, high-impact content.

ADVERTISING

In addition to delivering messages on multiple occasions, it is often necessary to use multiple channels to reinforce the message and reach more of the audience. This is why we propose to complement direct mail outreach to vendors with ad placement in trade journals. Trade journals are highly specific and we will tailor our ads to each publication's primary audience. Again, this is another highly cost-effective means to reach thousands of people in the desired market with the relevant message.

We will complement trade journal ad placement with in-depth technical information available for interested vendors and salespeople through *Home Energy's* Web site. *Home Energy* Magazine is the premier magazine of residential building performance and has an extensive Web site of technical resources. The magazine covers topics from insulation to ventilation, windows to weatherization, and Energy Star to energy savings. Headquartered in California, *Home Energy* is an excellent partner for disseminating information and tools to residential energy consumers and professionals throughout the state. Through this magazine and Web site, Install the Savings will reach the residential contractor market and also residential consumers themselves.

As the result of over 6 decades of combined experience with this market, team members understand how to target information for contractors as well as contractors' areas of weakness with respect to energy efficiency knowledge. Together with this knowledge and ES/LBD skills in marketing materials and strategies, we will cost-effectively hit the right contractors at the right time with the right energy efficient product information, other CPUC-funded program promotion information, and materials to be passed along to customers. To get these materials, contractors will be directed to *Home Energy's* Web site, where well-developed, nuts-and-bolts information is available on a wide array of issues relevant to residential energy efficiency. *Home Energy's* accessible and up-to-date information invites residential installers and other professionals to delve into the details and sharpen their skills. This means that contractors will not only perform better installations, but also that through them more customers will receive better information about energy efficiency opportunities.

INCENTIVES HOTLINE

The above mass media channels will be highly effective in distributing information about energy efficiency measures and statewide programs. We will also aim to include as much information about local programs as possible. Additionally, in order to transmit the most up-to-date information on the changing efficiency program landscape, we will complement those efforts with a toll free hotline for vendors. Experience has shown that vendors appreciate speaking to a person knowledgeable about the current mix of rebates and programs, in order to gain necessary clarity for their upcoming proposals, quotes and sales pitches. They may understand the issues well, but due to the demands on their time may be unable to keep track of the details of the full array of local programs available in their areas. Just as individual consumers do, vendors respond positively to quality service and accurate information. By acting as a clearinghouse for vendors, we can increase participation in local programs. Energy Solutions knows what works with vendors because we have provided extensive vendor support in the past – in PG&E's Express Efficiency Program and by operating a number of third party initiatives.

We will ensure a four-hour response time on all inquiries. If questions require further research, we will still contact the vendor within four hours as this level of responsiveness will motivate continued involvement on behalf of the vendors. Program staff will be knowledgeable about both statewide and local energy efficiency programs.

5. Marketing Quantities

DIRECT PROMOTION

We propose direct mail as a primary avenue to reach the critical target audience of salespeople and contractors. The direct mail campaign will distribute approximately 50 customized mailers targeted to key vendors and contractors for a total of 300,000 direct mail pieces.

Given our years of experience marketing utility programs and designing energy efficiency marketing materials, Energy Solutions/LBD will perform this work cost-effectively by taking advantage of the synergies that exist between the various direct mail pieces. The cost estimates for direct mail pieces include the cost of four-color printing, necessary to present the logos of all utilities. To effectively reach target markets with a consistent and convincing message, we propose to produce a few different sizes of direct mail pieces and to send multiple pieces to many different target audiences. The final breakdown of the number of and type of mailers will depend on the consensus developed between our team and the Commission's Authorized Representative. Providing high quality direct mail pieces is one of our strengths; our cost estimate includes budget for art and photography to illustrate the energy efficiency message. Energy Solutions will also include stock photography that we own at no charge. Various samples of our marketing pieces are shown in Section 10, "Marketing Experience".

ADVERTISING

This proposal also includes outreach through advertisements in magazines and Web resources. We propose to run 50 advertisements with messages tailored to different sectors. In all cases, advertisements would direct interested audiences to the incentives hotline and Web links describing current programs available for each sector. Where possible, these advertisements will be combined with links to articles that are accessible to vendors and residential customers. Examples of the types of information that helps vendors and residential customers Install the Savings can be seen on the *Home Energy* Magazine Web site, www.homeenergy.org. For example,

- "Identifying Refrigerators to Recycle Early: Replacing your Refrigerator"
- "Optimizing Your Ceiling Fan: Be more comfortable and save energy"
- "Energy Efficient Financing: How do you pay for making your house more efficient?"
- "What should I do about my windows?"
- "Bright Prospects for Lighting Retrofits"

At least 100 such articles about core issues for residential installation contractors, related vendors and interested homeowners will be available on the Web site.

INCENTIVES HOTLINE

As described above, each media piece will list the incentives hotline number. This hotline will enhance our ability to provide up-to-date and location-specific information about energy efficiency measures. We will ensure a four-hour response time on vendor inquiries. If questions require further research, we will still contact the vendor within four hours, as this level of responsiveness will motivate continued involvement on behalf of the vendors. Program staff will be knowledgeable about both statewide and local energy efficiency programs available throughout the state so that they can offer information on the broad list of services, measures and rebates to residential customers.

6. Target Audiences

One of the differentiating factors of this proposal is our ability to tailor messages to specific target audiences and still reach tens of thousands of key market actors. Our years of energy efficiency program design, implementation, and marketing have produced a large reservoir of experience, not only in identifying and segmenting customer and trade ally groups, but also in developing relevant content for each particular audience. While still addressing the overall market, we propose to emphasize categories of market actors that are less effectively addressed by the main mass media campaign. Our target audiences include:

RESIDENTIAL CUSTOMERS

The residential customer base is quite heterogeneous, and presents difficult challenges for marketing energy efficiency products and services. The simplest method is a blanket approach that maintains efficiency as an important issue in the collective mind, and indeed this is what Flex Your Power has achieved with excellent results. This approach is necessary but often not sufficient to "close the deal" with a particular customer for a given appliance purchase. Some more specific, targeted coaching is required for pro-efficiency purchasing to take place. Reaching the customer with information at an appropriate level of detail, and at a moment when he or she is in the process of making a purchasing decision, requires not only access to the customer's mailbox but also agile injection of the efficiency message at various points along the efficiency supply chain. Install your Savings promises to help get the efficiency message across clearly and reliably.

When researching an appliance purchase, customers first turn to their local vendors. This interaction provides a tremendous opportunity to make sure that customers receive energy efficiency information when they are actually making a purchasing decision. Install the Savings helps inform and motivate the vendor to become a more knowledgeable and trusted resource, able to coach the consumer to make a pro-efficiency choice.



RESIDENTIAL CONTRACTORS AND VENDORS

We plan to target Residential Contractors to increase their awareness of energy efficiency and to provide specific information about programs and services available to them and their customers. This audience includes the following types of contractors and vendors:

Table 4. Residential Contractors and Vendors

Sector with direct customer contact	SIC Code	Sector with direct customer contact	SIC Code
General Contractor - single family houses	1521	Insulation cold and heat	1742-05
General Contractor - residential building	1522	Energy conservation prods-wholesale	5033-06
Plumbing, heating and air conditioning	1711	Energy conservation prods-retail	5211-36
Insulation	1742	Hardware retail	5251-04
Electric and windows - retail	5211	Appliances-household-major-dealers	5722-02
Lighting fixtures, retail	5719	Hardware consultants	7379-01
Homebuilders	1521-12	Family homes	8351-01
Air conditioning contractors and systems	1711-17	Home design and planning service	8712-13
Duct systems- AC and heating	1711-24		

The primary objectives in targeting Residential Contractors include:

- Promoting the statewide programs
- Promoting local programs
- Directing contractors to the *Home Energy* Magazine Web site to get special, current articles relevant to their business, which will be developed as part of Install the Savings
- Providing information pieces that contractors can pass on to customers as a resource during the energy efficiency services sales process

NON-RESIDENTIAL AUDIENCES

Many vendors that serve residential customers also serve small commercial customers. While the primary focus will be residential, we will cross-market energy efficiency programs serving small commercial customers as part of our effort. For example, a marketing piece might highlight residential air conditioner rebates, but have a small section at the end that covers commercial rebates as well, to take advantage of any potential crossover. As an additional bonus, this crossover is likely to occur with small, hard-to-reach commercial customers, since residential vendors will generally not be working with larger businesses.

7. Reaching IOU Customers

When purchasing an appliance or other device that uses energy or impacts energy consumption, customers generally come into contact with a sales person or contractor. According to the U.S. Census Bureau's 2000 Census, California has a total of 11,502,870 households. Each of these households typically has a water heater, furnace, heating ducts, insulation and at least one refrigeration unit. Considering that these appliances are rated for a 15 year useful life, we see that the typical household needs to replace one of them every third year (15 years / 5 appliances). This results in suggested annual replacement of 3,834,000 appliances. Factoring in a rate of 50% deferred maintenance on the 43% of households that are rental units, we determine that around 2,991,000 appliances (78% of suggested replacement) are actually replaced each year. This represents a large number of opportunities to influence consumer decisions. And apart from these major appliances, the number of purchases of residential lighting equipment is also very large. For example, our review of IOU implementation plans yields an estimate of approximately 5 million compact fluorescent lamps (CFLs) per year for residential customers.

Of these estimated 3 million appliance purchases and 5 million CFLs, we expect to reach the majority of the suppliers, potentially giving us access to all their customers. Our effort will involve contacting each of those suppliers approximately every two months. In this way, energy efficiency messages will remain on the front burner. The ultimate key to the success of the Install the Savings effort will be the ability of the marketing materials to capture the attention of the suppliers. The best indication of our ability to succeed is the result from three years of running a turn key marketing campaign for PG&E's Express Efficiency program. At the conclusion of this effort in 2002, which included a heavy emphasis on marketing to vendors, over 22,000 customers participated. Energy Solutions also received six contracts for local programs in 2002 and exceeded goals on all six programs. The bottom line: customers win with an integrated approach to transmit the efficiency message.



8. Coordinating with Statewide and Local Programs

At any given moment, a broad array of energy efficiency programs is available to a wide variety of electricity customers in California. Energy Solutions has been intimately involved with the largest of the statewide programs, and has also been a consistent innovator designing effective smaller programs for distinct localities and targeting specific market sectors. In fact, Sam Cohen (President of Energy Solutions) recently received a Program Design Innovator award from the Association of Energy Engineers. Our team is very much aware of the variety and diversity of programs operating in the California efficiency arena.

Install the Savings will mesh with existing statewide programs primarily through links with utility program coordinators. We will also coordinate with the relevant executives and representatives of the regional contractors and vendors. In broadest terms, the goal will be to complement primary statewide program messages by highlighting their benefits to a carefully selected and leverageable target audience. Install the Savings will help target hard-to-reach customers by delivering the efficiency message to trade allies in ways that stimulate their ability to provide timely and topical information to their potential clients and customers. Such "densification" of the marketing environment, by combining each statewide program's message with new, complementary and more targeted ones, will heighten awareness throughout the efficiency supply chain, resulting in increased penetrations at the consumer level. This is a particularly attractive approach for the appliance programs since manufacturers and vendors are typically where consumers receive information that influences their purchasing decisions.

At the same time, we will maintain current information on the local efficiency programs available throughout the state by remaining in contact with the program leads. Thus, for a given market niche in a particular part of the state, we will be able to network fluidly with the relevant vendor groups and trade associations, assisting them to enhance their marketing and to ensure that timely, precise and geographically tailored information is available for them. From there we will provide additional support, including references to the *Home Energy* Web site and any other technical or programmatic information available. The following (non-comprehensive) list of the technical foci of a number of the current and/or recent local programs offered in California reflects the diversity of programs available:

- Duct sealing
- Energy Star gas furnace
- Programmable thermostat
- Attic insulation
- Wall insulation
- High performance windows
- Efficient gas water heater
- Pipe insulation
- Low flow showerheads
- AC tune ups
- Energy Star heat pump
- Energy Star AC (split system and packaged)
- Energy Star clothes washer
- Energy Star dishwasher
- Whole house fan
- Pool pump and motor replacement
- Evaporative coolers
- Fluorescent lighting fixtures
- Screw-in CFLs
- Heat pumps (split system and packaged)

9. Evaluation And Ongoing Improvement

Evaluation is an important aspect of any Energy Efficiency program. For this Program, we propose an evaluation methodology that will allow our team to use evaluation results to maximize the effectiveness of the marketing campaign. Additionally, we suggest an evaluation methodology that will enable a third party evaluator working on behalf of the Commission to determine during the implementation phase whether the mass media campaign described in this proposal is achieving its objectives.

USING RESULTS TO IMPROVE MARKETING CAMPAIGN

Our proposed strategy results from our combined 35 years of experience marketing energy efficiency programs. However, customer opinion can shift and marketing strategies should be reexamined on an ongoing basis as program experience identifies marketing gaps and successes. We will use both formal and informal evaluation results to inform decisions about marketing messages and targets.

For example, in promoting PG&E's SmarterEnergy program, we conducted focus groups, interviewing customers and vendors regarding:

- the most effective ways to reach customers and vendors with Peak kW information and incentives for customers to participate in Peak kW energy efficiency retrofitting.
- the Peak kW marketing materials; and
- the ideal format and content for disseminating Peak kW retrofit information via Pacific Gas and Electric Company's SmarterEnergy web site.

Feedback on marketing materials and customer perceptions informed future outreach in the SmarterEnergy campaign. Informal contact with vendors and residential customers can also be used to obtain low-cost feedback.

EVALUATION

We propose to develop an Evaluation Plan as one of the first deliverables under a contract awarded for this Program. The Evaluation Plan should be developed in tandem with the overall Program's scope of work. The evaluation approach could include the following:

1. Determine what the evaluation process is meant to measure. The decision will be influenced largely by the specific messages or objectives contained in the approved scope of work for the overall Program. The scope of work will be built around a program theory, and evaluation will test this theory. As suggested above, testing would not likely include actual energy savings impacts. Rather it would address the effectiveness of the marketing tactics.

For example, one could test to see whether awareness about a particular technology or program has changed as a result of the marketing campaign. One could also seek to determine whether a marketing tactic favorably changed perceptions about energy efficiency generally or about the importance of a program or ECM. Furthermore, one could seek to determine whether a marketing tactic influenced a customer's procurement decisions. The selection of applicable test measurements must be made in such a way as to isolate this Program's impacts from those of the larger mass media program for which this Program provides an important and complimentary boost.

2. Determine which of the many Program elements (targeted marketing tactics) will be evaluated for their efficacy. With thousands of mailings on a variety of different topics, fiscal prudence requires that the scope of the evaluation be limited to a few representative marketing tactics (i.e., specific mailers).
3. Identify the measurement tools or strategies. There are four primary strategies for the evaluation team to measure baseline conditions and post-tactic impacts: mail survey, phone interview, tactic-integrated tracking indicator (e.g., special offers that require self-registration with our Program) and finally, third-party program-integrated tracking features such as a special 800 number contained in the marketing tactic's call to action. Of course, combinations of the above may offer the best solution.
4. Gather relevant baseline awareness, attitudinal, and/or behavioral data in the targeted market segments. CALMAC and CEC may have existing attitudes and awareness results for the target market segments, but these market segments must first be defined in order to ascertain the availability of pre-existing baseline data. Where baseline data is lacking, the evaluation plan will outline the baseline development strategy. Depending on the actual tactics selected and their timing, either a pre-tactic test can be conducted among targeted customers or a control group sample can be isolated from the targeted market segments and tested concurrently with or after the implementation of the marketing tactic selected in the first step above.
5. Measure the post-tactic impacts. Generally, post-tactic measurements should be implemented quite soon after the tactic in order to get the most accurate assessment of the tactic's impacts. Thus, we propose that evaluation occur throughout Program implementation rather than simply upon its completion. Post-tactic measurement strategies must be consistent with the baseline data gathering strategies in order to demonstrate Program impacts credibly. It is likely that measuring certain data such as program participation as a result of the Program's outreach will require assistance from IOUs and other parties. Performing some evaluation concurrently with the Program's implementation will allow the Program team to modify themes, messages, and strategies and make other mid-course corrections to enhance the effectiveness of remaining Program activities.
6. Analyze the changes between baseline or control group awareness, attitudes, and/or behaviors and the post-tactic awareness, attitudes, and behaviors of samples of customers targeted by the marketing tactics. Evaluators may then make quantitative assessments of the effectiveness of the Program on a nominal basis, on a cost basis, and on a comparative basis with other information-only programs. These findings can be used to determine whether tested program tactics should be continued, revised, or eliminated all together from future program portfolios. Where third-party program-integrated tracking features are possible, evaluators may be able to specifically attribute ECM savings to the Program, but this is likely to be a limited opportunity.

To reduce costs and save time, existing data will be used wherever appropriate. Statistical sampling methods will be used to minimize the number of sample points required for both developing baselines and measuring changes. In some cases, qualitative analysis may be recommended to help in improving future tactics, reducing costs associated with quantitative analysis, and to tease out issues that are difficult to identify through quantitative analysis.

10. Media Campaign Experience

ENERGY SOLUTIONS' core areas of expertise are in design, implementation, and strategic marketing and communication of energy efficiency programs. ENERGY SOLUTIONS combines our technical and marketing knowledge of energy efficiency with the skills of Linda Brandon Design, a graphic design team experienced in energy efficiency, to quickly develop marketing materials to meet the desired objectives. ENERGY SOLUTIONS has used these skills to effectively market utility, government, and private programs, including PG&E's flagship energy efficiency program, Express Efficiency. We have also developed marketing materials for the other California IOUs and several municipal programs ranging from residential air conditioning incentives to energy efficient design assistance. *Home Energy Magazine* will deliver web-based technical content.

Energy-Efficiency Marketing Strategy Development Experience

ENERGY SOLUTIONS has extensive experience in creating and implementing turnkey marketing solutions for energy efficiency programs, products, and services. ENERGY SOLUTIONS has designed, marketed, managed, and evaluated a range of energy efficiency marketing programs for Pacific Gas and Electric Company, Southern California Edison, San Diego Gas and Electric, Southern California Gas, Roseville Electric, the California Energy Commission, Stanford University, the City of Oakland and other clients. Our familiarity with energy efficiency markets enables us to target marketing materials, messages, and promotional strategies to respond dynamically to market conditions and client needs. Our market research capabilities range from conducting focus groups to synthesizing secondary market research to developing effective marketing strategies that target specific sectors and market actors and achieve desired implementation objectives.

Express Efficiency and Standard Performance Contract Programs ENERGY SOLUTIONS has assisted PG&E in creating and executing marketing plans for the Standard Performance Contract (SPC) program, the Express Efficiency rebate program, and the SmarterEnergy web site. These efforts have included developing year-long marketing plans for overall program outreach, as well as specialized one-time targeted campaigns to raise program participation at crucial times of the year. From 1998 to 2000, ENERGY SOLUTIONS' turnkey marketing efforts for PG&E's Express Efficiency program resulted in the program's exceeding target goals; the 2000 program received over 22,000 applications. Energy Solutions also designed and produced applications for the statewide Express Efficiency rebate program for small- and medium-sized business customers served by California's four investor-owned utility companies.



Design and Production of Marketing Materials

The LINDA BRANDON DESIGN/ENERGY SOLUTIONS team has worked closely for the last five years to produce effective marketing materials for energy clients. By combining our technical and market knowledge of energy efficiency with the skills of a graphic design team experienced in energy-efficiency programs, we can quickly provide high quality, effective marketing materials to launch a program and boost participation. Our team has designed energy efficiency marketing materials for Pacific Gas and Electric Company, Southern California Edison, San Diego Gas and Electric, Southern California Gas, the California Energy Commission, Stanford University, and the City of Oakland.

Together we have designed, written, and in many cases produced brochures and fact sheets for PG&E's Express Efficiency, Standard Performance Contract (SPC) and CustomNet programs. ENERGY SOLUTIONS has also worked with Linda Brandon Design to create and produce brochures for the independent programs we administer under PG&E's Third Party Initiative funding. Our team has developed a wide variety of collateral materials including:

- Mailers – postcard, single- and multi-fold, slim-jim, and other formats. (Express Efficiency, SPC, SmarterEnergy, PG&E Energy Efficiency Seminars)
- Promotion registration forms with business reply card. (Express Efficiency)
- Application forms. (Express Efficiency, SmarterEnergy)
- Promotional business cards. (SmarterEnergy)
- “Give-away” items – sticky notes, pencils, etc. (Stanford University)

Our team members work together to deliver an integrated package of marketing services that directly address the program needs. Examples can be found in the Sample Marketing Materials that follow.

This section removed.

“Color plates” between pages 17 and 18 have been removed from the electronic service version of the proposal pdf file due to the memory requirements. The removed section includes a color display of our previous marketing materials and an accompanying descriptive narrative.

The “color plates” section is available from the Energy Solutions Web site at www.energy-solution.com or may be requested by emailing ted@energy-solution.com

Selected Samples OF OUR Marketing Materials



11. Energy Efficiency Program Experience

Independent Program Administration

The ENERGY SOLUTIONS/LINDA BRANDON DESIGN team understands that effective program administration requires full fiscal responsibility and client accountability. Specifically, the program administrator must be able to create innovative and responsive program designs, identify and forge effective partnerships, and manage all budgetary, tracking and reporting requirements. Our team has experience in all of these areas.

ENERGY SOLUTIONS staff members have administered contracts ranging from \$5,000 to \$2,000,000 with overall responsibility for energy efficiency program budgets as large as \$15 million. ENERGY SOLUTIONS has extensive experience managing teams of subcontractors and subcontracts as well as providing comprehensive status reporting to IOU and state agency clients. ENERGY SOLUTIONS' experience in these areas is recently evidenced by the administration of six autonomous energy efficiency contracts through third party solicitations in 2000 and 2001. **These contracts all exceeded goal and came in under budget.** Two of these programs are described briefly below.

Office Equipment Efficiency Program Office equipment uses significant amounts of daytime, on-peak electricity, yet available energy efficiency measures to reduce this end use have historically been underutilized. Recognizing this untapped resource, ENERGY SOLUTIONS developed the cross-cutting Office Equipment Efficiency program. To help commercial and institutional customers reduce energy use of office plug load, the program disbursed and tracked incentive payments for enabling ENERGY STAR® monitor power management, provided free technical assistance, and created instructional web pages and marketing materials as part of its Outreach and Marketing activities. By partnering with a manufacturer of energy-saving hardware, the program provided occupancy sensor controls for lighting and plug loads to participants at below wholesale costs.

FastTrack Efficient Lighting Program ENERGY SOLUTIONS developed FastTrack for medium and large business customers. By offering attractive incentives directly to vendors and contractors working with efficient lighting technologies, FastTrack enabled streamlined and effective market development for some of the most quickly deployable new technologies. ENERGY SOLUTIONS performed all program tasks, including the initial program design, marketing plans, marketing materials, ensuring quality control through post-field inspections, and paying incentives to the vendors within in two weeks of project installations.



Program Management Experience

The ENERGY SOLUTIONS team brings extensive experience developing, marketing, and administering energy efficiency programs. Our experience covers the entire range from conducting market research, innovating initial program designs, assessing technologies for inclusion in programs, creating marketing strategies and materials, managing implementation activities, and conducting quality assurance work. Our programs have been successful because we develop key trade ally relationships, integrate necessary staff resources or leverage external resources as appropriate, manage a schedule in which deliverables are completed on time and within budget, and provide day-to-day oversight by proactively problem solving and interfacing with partners, subcontractors, and our client. We have worked with large and small utilities and municipal clients, on residential and non-residential programs. Our program strategies have included incentive programs, prescriptive and customized rebates, energy management services and information programs. For programs in which we have had a substantial role in design and implementation we have almost always met or exceeded client goals and milestones. The following examples illustrate our experience managing programs.

Express Efficiency Program From 1997 through 2000, ENERGY SOLUTIONS managed much of the Pacific Gas and Electric Company Express Efficiency commercial retrofit rebate program design and implementation activity, for both upstream and downstream components. From 1998 to 2000, ENERGY SOLUTIONS' turnkey marketing program for PG&E's Express Efficiency program resulted in the program exceeding target goals; the 2000 program received over 22,000 applications, a dramatic increase over the previous year. ENERGY SOLUTIONS also designed and produced applications for the statewide Express rebate program for small- and medium-sized business customers served by California's four investor-owned utility companies. The utility companies chose to base the new (as of 2000) statewide program on the PG&E Express Efficiency program, which ENERGY SOLUTIONS supported for several years.

City of Oakland's Energy Efficiency Design Assistance Program ENERGY SOLUTIONS was selected to operate this city-sponsored local program that offers customized energy efficiency design assistance services to owners, designers, and contractors to improve the energy efficiency of new and remodeled building construction. The services from this innovative program are promoted to private sector developments in conjunction with the City's normal planning, zoning, and building permit services. Together with ENERGY SOLUTIONS, Linda Brandon Design developed the marketing materials for this program. Energy Solutions conducts the outreach and recruitment activities in coordination with the City. ENERGY SOLUTIONS also manages the technical services team, customer relations, overall quality control, and program tracking and reporting. This PY 2001 program achieved 157 percent of its program goals and was funded again for 2002/3.

2000 Upstream Residential Air Conditioning Program ENERGY SOLUTIONS supported the design of this program and then fully implemented it on behalf of PG&E. The program required developing relationships with potential trade ally participants, the creation of a tracking database, payment of incentives, and coordination of post-field inspections. ENERGY SOLUTIONS handled the day-to-day operation of the program, often interfacing with residential AC distributors to answer program questions and facilitate participation in the program.

Commercial and Residential Energy Efficiency Programs for Municipal Utilities ENERGY SOLUTIONS designed a comprehensive portfolio of energy efficiency programs for Roseville Electric. The portfolio contains technical assistance and incentives for increasing non-residential energy efficiency through equipment retrofit, design and equipment selection for new construction, and improved operations and maintenance practices.

PG&E's Growing Businesses Success CD-ROM Project ENERGY SOLUTIONS assisted PG&E with the development of PG&E's Growing Businesses Success CD-ROM small business self audit tool. ENERGY SOLUTIONS provided project management services including coordinating team members and communications, developing the CD-ROM features/specifications and quality assurance testing plan, testing the CD-ROM, and developing a marketing plan and mailer to distribute CD-ROMs to small and medium customers.

Energy Efficiency Technical Expertise

The ENERGY SOLUTIONS /*HOME ENERGY* team has a diverse and talented technical staff. ENERGY SOLUTIONS' staff includes engineers and Certified Energy Managers experienced with technical and economic aspects of energy efficiency programs and projects. In addition to overseeing numerous technical projects, ENERGY SOLUTIONS' staff has performed ECM technology analysis, in-field audits and economic analysis including deemed savings analysis both for IOU filings and for our third party energy efficiency programs.

Since its inception, *Home Energy* Magazine has earned a national reputation as the premier source of accurate technical information on residential energy efficiency, home performance, and whole-house building practices for the professionals who build, remodel, and work in our homes. All the information published by *Home Energy* is exhaustively peer-reviewed and reflects the most rigorous standards of scientific inquiry. *Home Energy's* 80 percent renewal rate—an exceptional rate for any publication—is clear evidence that the publication is providing essential information to our targeted audience.

12. Qualifications

SAM COHEN, President Mr. Cohen founded ENERGY SOLUTIONS in 1995. He specializes in providing program design, marketing, and implementation assistance for energy efficiency programs. In 2001, he supervised six third party energy efficiency contracts, all of which exceeded goal. He is now supervising ENERGY SOLUTIONS' 2002/3 local program contracts. For many years, he helped manage Pacific Gas and Electric Company's (PG&E) Express Efficiency (nonresidential retrofit) program. Between 1998 to 2000, ENERGY SOLUTIONS' turnkey marketing program for PG&E's Express Efficiency program resulted in the program exceeding target goals; the 2000 program received over 22,000 applications, a substantial increase from previous years. PG&E's Express Efficiency program was adopted statewide in 1999 and Energy Solutions helped all four investor owned utilities launch their own versions of these programs. Mr. Cohen carried out focus groups for developing SPC programs for small commercial

customers and developed deemed savings values for a set of measures in the Residential Standard Performance Contract program. Projects for other clients include strategies for capitalizing on electric deregulation, energy efficiency marketing strategies, process evaluations, and greenhouse gas reduction planning. Mr. Cohen is co-author of a successful \$1.3 million DOE Rebuild America grant to transform local energy efficiency markets.

Prior to starting ENERGY SOLUTIONS, Mr. Cohen was an Associate at Barakat & Chamberlain, where he specialized in Demand Side Management (DSM) program design and implementation. Mr. Cohen also managed the company's technology database and was the firm's specialist in lighting, motors, and adjustable speed drives. Before that, Mr. Cohen was a Senior Research Associate at Lawrence Berkeley National Laboratory, where he worked on evaluating energy savings and economics of retrofitting single-family homes, incorporating environmental externalities into utility planning, and DSM bidding. Mr. Cohen received his Masters Degree from the Energy and Resources Group at U.C. Berkeley, and his Bachelors Degree in Mechanical Engineering, also from U.C. Berkeley. Mr. Cohen received the 2002 Program Design Innovator Award from the Association of Energy Engineers Bay Area Chapter.



TED POPE, Director Mr. Pope manages ENERGY SOLUTIONS' residential new construction and retrofit markets consulting practice. He provides market research, program design and implementation, regulatory compliance, and efficiency standards intervention support activities to utility, local government, and non-profit clients. Currently, Mr. Pope is administering the LightWash program, which promotes efficient commercial clothes washers and lighting systems. Mr. Pope directs the marketing and outreach efforts of this quasi-statewide program, including developing marketing materials and ad copy, presenting to trade allies, and networking with industry partners. Previously, Mr. Pope developed and/or managed the residential clothes washer, refrigerator, lighting fixture, emerging technologies, and geothermal heat pump programs for Pacific Gas and Electric Company (PG&E). Prior to PG&E, he provided program-planning assistance to the Northwest Energy Efficiency Alliance. He was also engaged by the Natural Resources Defense Council to represent them in the federal appliance standards rulemaking process for clothes washers. Earlier, at Seattle City Light in Seattle, Washington, Mr. Pope managed a water heater rebate program and earned an EPRI Innovator award for leadership of the ground breaking EPRI clothes washer research project known as THELMA. While at Seattle City Light, he helped develop the performance specifications and authored the technical support documentation for Consortium for Energy Efficiency's widely adopted national efficient washer program. Prior to Seattle City Light, Mr. Pope worked at the Washington State Energy Office where he prepared program evaluations and provided technical support to Northwest utilities for residential appliance program development. Mr. Pope earned a Bachelor of Science in City and Regional Planning from Cornell University with an emphasis in engineering.

JENNIFER FOX, Project Manager Jennifer Fox works on energy efficiency-related policy development, program design and project management. She has experience marketing a variety of energy and water conservation programs, currently heading high-efficiency washing machine outreach to the multi-family housing sector. As ENERGY SOLUTIONS' focus group specialist, Ms. Fox has worked with local and international clients to research public opinion on energy issues ranging from energy efficiency marketing strategies to deregulation. She has worked for three years on energy cost benchmarking analysis for corporations and agencies. This analysis helps large customers target facilities for cost effective energy efficiency improvements. Ms. Fox also works with municipalities, including developing a Greenhouse Gas Emission Reduction Plan for the City of Oakland, a critical component of which is the integrated energy efficiency strategy. A former Environmental Engineer for the U.S. Environmental Protection Agency, Region IX, Ms. Fox has experience working with California's regulators, utilities and industries. At EPA, she focused on air pollution rule development, stationary sources permitting, and cross-media projects. Ms. Fox has also worked on hydroelectricity and sustainable water resource development. As a 1994 Fulbright Scholar, she examined the effects of electricity deregulation and privatization on hydroelectric engineering projects. Ms. Fox has a Bachelor of Science in Engineering and a Master of Science in Environmental Engineering from Stanford University.

ANDREW MCALLISTER, Project Manager Mr. McAllister works on energy efficiency program design and public policy. Currently, Mr. McAllister manages the development of targeted marketing materials for three new energy efficiency programs. He ensures delivery of a clear, effective message to each target audience through close communication with the client and by providing a fluid interface with the designers. Mr. McAllister is also developing analysis in support of the development of new California efficiency standards for specific product areas, as well as providing program support for a number of new CPUC-funded efficiency initiatives. He recently assisted the government of Ecuador and the World Bank to identify energy efficiency opportunities in that country and design initiatives to increase the scale of activity and the viability of investments in efficiency there. He managed Phase I of the FastTrack Efficient Lighting Program, an independent incentive program designed and operated by ENERGY SOLUTIONS, which worked with lighting vendors and contractors to stimulate the market for innovative efficient lighting technologies. Prior to joining ENERGY SOLUTIONS, he worked for seven years based in South America as Renewable Energy and Energy Efficiency Specialist for NRECA International, Ltd. While with NRECA, he lived and worked primarily in developing countries, including Bangladesh, Bolivia, Brazil, Chile and South Africa. He managed diverse initiatives aimed at improving both the efficiency and coverage of electric service provision, including programs in industrial load management, load data acquisition and analysis, rural electrification planning, remote power supply, and renewable energy system engineering and design. Training has been an integral component of most of these specialty areas, for diverse clients from utility executives and industrial facility managers to solar energy technicians and rural users. Mr. McAllister has also worked as a researcher at Lawrence Berkeley National Laboratory, where his focus was performance evaluation of efficiency retrofits in the multi-family sector. Mr. McAllister received a Master of Science Degree from the Energy and Resources Group at U.C. Berkeley, and dual Bachelor of Arts degrees in Engineering Sciences and Art History from Dartmouth College. He served in the Peace Corps in Costa Rica.

ERIKA WALTHER, Project Manager Ms. Walther has experience marketing a variety of energy and water conservation programs, currently focusing on LightWash outreach to coin laundry stores and industry trade allies. She also markets and implements the Water-wise Landscape Rebate Program for Stanford University's Utilities Division and provides technical support for development of new State appliance standards. Previously, Ms. Walther supported marketing and implementation activities for the Office Equipment Efficiency Program, a third party initiative administered by PG&E in PY2001, and PG&E's Residential Air Conditioning Distributor Incentive program for PY2000. Other recent projects include managing the design and distribution of energy-efficiency program brochures, implementing an email marketing campaign to reduce peak electricity use, and supporting PG&E's work with local governments to promote green building practices. Ms. Walther brings with her international and domestic experience in the design, implementation, and financing of renewable energy projects. Prior to coming to ENERGY SOLUTIONS, Ms. Walther conducted research at U.C. Berkeley's Renewable and Appropriate Energy Laboratory assessing the efficiency and performance of solar thermal and solar electric technologies. Ms. Walther is a Certified Energy Manager (C.E.M.) and received her Master of Arts Degree from the Energy and Resources Group at U.C. Berkeley and her Bachelor of Arts Degree in Environmental Studies from U.C. Santa Barbara.

LINDA BRANDON, Art Director / Graphic Designer For the past five years Ms. Brandon has been designing collateral material for ENERGY SOLUTIONS. She brings 25 years of expertise producing corporate communication, advertising design and marketing projects for corporate clients. She has designed direct mail pieces, print advertisements, program applications, brochures, and other marketing materials for energy efficiency programs. Prior to becoming a design consultant, Ms. Brandon was Senior Designer and Art Director for 19 years at Lawrence Bender & Associates, a nationally recognized design firm. She conducted classes in Communication Design for 10 years, including lectures at The University of California at Santa Cruz, San Jose State University, and Foothill College. Ms. Brandon has produced a wide range of projects for a variety of clients. Her work has included logo design, corporate identity programs, book design, catalogues, brochures, magazines, packages, print advertising, exhibit graphics, annual reports posters, and web sites. Clients include Pacific Gas and Electric Company, Southern California Edison, Southern California Gas, San Diego Gas & Electric, Energy Management Consultants Inc., City of Oakland, Cetus Corp., Intel Corp., Dataquest Inc., Priam Corp., LSI Logic Corp., Bekins Corp., Advanced Micro Devices Corp., Tandem Computers Corp., Convergent Technologies Corp., Baker International Corp., Chemtrack Corp., California Microwave Corp., Restoration Hardware Inc., Williams-Sonoma Inc. and Charles Schwab & Co. Inc. Ms. Brandon's work has won design awards from the Western Art Directors Shows, San Francisco Art Directors Shows, San Francisco Society of Illustrators Shows, Los Angeles Art Directors Shows, New York Art Directors Shows, San Francisco Gold Medal Show, Public Relations Society of America, Communication Arts, American Institute of Graphic Arts: Books, Graphics Print Ads, Cover Competition, and California Shows, Print Magazine Regional Design Annuals, ARC: USA Annual Report Competition (Bronze medal), Mead Show: 30 Best Annual Reports, Dimensional Illustrators Show (Bronze medals), Kudos from Hooper International Design Competition, Potlatch Northwest Paper Award of Excellence, Murphy Award for Advertising (Gold medal), and Printing Industries of America Awards, Financial World Merit Award. Her work has appeared in advertising books and publications including Annual Report Trends, Print Casebooks, An Intro To Design, Annual Report Design, and Diagraphics II— International Creators. Linda Brandon received a B.A. in Art from San Jose State University and teaching accreditation from the University of California at Berkeley.

TIMOTHY LAU, Senior Graphic Designer Mr. Lau is an award-winning graphic designer with over 25 years of international design and advertising experience. For the last three years has been has been designing marketing materials for energy efficiency for Linda Brandon Design. In Hong Kong, he worked with Henry Steiner at the internationally renowned Graphic Communications Ltd. In Canada Mr. Lau worked as senior designer at the design firm, Klaus Hoffman & Associates, and later at Accord Communications, an advertising firm. He was cofounder of Studio 3 Graphics where he created high profile promotional projects for the Government of Alberta. He settled in the Bay Area in 1984. For 12 years Mr. Lau was Senior Designer at Lawrence Bender & Associates where he specialized in creating promotional pieces for high-tech corporations. In 1997 he joined Huber Marketing Group as senior art director, producing advertising campaigns, conference/trade show graphics, and corporate identity programs for startup companies. He studied graphic design at the Chinese University of Hong Kong.

MARGARET HELLMANN, Senior Graphic Designer Ms Hellmann has 20 years of experience producing design, illustration, logos, consumer packaging, ads, marketing brochures, annual reports and web sites for a variety of clients. From 1995 to the present, She has been working in association with Linda Brandon Design to produce design and illustration including energy efficiency marketing projects in conjunction with ENERGY SOLUTIONS. From 1983 to 1994, Ms Hellmann was a designer, art director, and illustrator for Lawrence Bender & Associates. She holds a BA. in Graphic Design from San Jose State University. Ms. Hellmann's design excellence awards include A.R.(Annual Reports) 100 Awards –Best of Show, Art Directors Club of New York, American Institute of Graphic Arts -AIGA, Creativity, Print's Regional Design Annuals, Print's Best Logos & Symbols, Print's 25 Best Designed Annual Reports, Mead Annual Report Show, San Francisco Art Directors Club, and Western Art Directors Club. Illustration Excellence Awards include New York Society of Illustrators, Print's Regional Design Annuals, San Francisco Society of Illustrators, Los Angeles Society of Illustrators, and West Coast Show.

WILLIAM LOMAX, Graphic Designer, Production Specialist, Technical Expert From 1997 to the present Mr. Lomax has been working in association with Linda Brandon Design. He is a graphic designer specializing in technical production and has worked for the last 5 years on energy efficiency marketing projects in conjunction with ENERGY SOLUTIONS. From 1985 to 1995, Mr Lomax was a student of Linda Brandon's when she taught Communication Design at Foothill College. After graduating, he worked independently as a graphic designer. He taught classes in computer applications for graphic designers for the University of California Extension program and wrote a successful book on PageMaker that was published and distributed nationwide. He is skilled in graphics applications and has worked as technical consultant for a number of designers. His range of projects includes graphic design, illustration, typography, corporate identity, pre-press production, press management and product design. He has received design excellence awards from American Corporate Identity 3, American Corporate Identity 5 and Western Art Directors Club. He holds a BS in Graphic Design from San Jose State University.

MARY JAMES, Publisher/Executive Director Ms. James is executive director of Energy Auditor & Retrofitter, the non-profit organization that publishes *Home Energy* Magazine. She manages the staff and budget for the organization, directs the design and is responsible for the content of the Web site, implements special projects, and oversees all aspects of the production of the bimonthly magazine, *Home Energy*. She specializes in providing tailored energy-efficiency content for targeted audiences. The magazine is directed at a professional audience that includes residential contractors, builders, researchers, program managers, and energy efficiency professionals generally. The Web site, in separate sections, contains content specifically crafted either for consumers or for professionals. Previously, Ms. James has written articles covering scientific news for a variety of publications, ranging from *Health*, *American Health*, and *Audubon* to *E* magazine. She has also collaborated on research projects analyzing methods of measuring transit equity and assessing multi-modal performance measures. Ms. James earned a Master of Science degree in Environmental Policy Analysis from the University of California at Davis. She received both a certificate in science communication and a B.A. in Chemistry/Biology from the University of California at Santa Cruz.

ALAN MEIER, Principal Investigator Alan Meier is a Staff Scientist and Principal Investigator at Lawrence Berkeley National Laboratory. Meier led the Building Energy Analysis Group at LBNL for almost a decade. In that time he investigated a wide range of topics related to energy use of buildings and equipment, including energy test procedures for appliances, field measurements of appliances, and indicators of energy performance of buildings. He pioneered the concept of “supply curves of conserved energy” and estimating energy conservation potentials. Meier’s role in LBNL is “independent researcher” where he is encouraged to pursue research areas of his own choosing. Recently, Meier has studied standby power use and technologies to reduce it. Meier has published over one hundred articles in refereed journals and magazines. He is Editor-in-Chief of the journal, *Energy and Buildings*. In 1983, he founded the non-profit, organization, Energy Auditor & Retrofitter, and began publishing *Home Energy* Magazine. He has Bachelor’s Degrees in Chemistry and Economics from the University of California, Berkeley. After graduate work in Chemistry at the Technical University of Munich (Germany) and the University of Pennsylvania, he obtained a Ph.D. in Energy and Resources from the University of California, Berkeley.

13. Disclosures

We do not see any substantive conflicts of interest. Reviewers should be aware that Energy Solutions is prime on the LightWash program, and subcontractor on three local programs (Stockton Brighter Businesses Program, Santa Cruz/Monterey area Right Lights Program, and the Oakland Energy Partnership Program), all CPUC local programs funded in 2002.



14. Timeline

While messages may change depending on the results of ongoing evaluation of the program, a strong marketing effort is critical in the first two quarters. In this section we present the launch plan for key marketing pieces and outreach activities. The timing estimates presented for the basic marketing activities assume that any necessary contracts are in place prior to the recommended starting dates and that administrator reviews are timely. Additionally, we will coordinate with Flex Your Power and look for opportunities to time our materials in conjunction with their efforts.

Implementation Date	Activities
First Quarter 2003	<ul style="list-style-type: none"> ■ Develop graphic look and feel to brand Program ■ Write detailed marketing plan ■ Obtain and begin staffing toll free incentives hotline ■ Develop, finalize and post web content ■ Develop lists of statewide and local energy efficiency programs that apply to residential audience ■ Develop mailing lists for target vendor groups ■ Reserve placements in trade journals ■ Write, design, print, and mail first round mailers ■ Write, design and place first round ads
Second Quarter 2003	<ul style="list-style-type: none"> ■ Obtain feedback on first round mailers and ads ■ Revise and expand mailing lists ■ Write, design, print, and mail second round mailers ■ Write, design and place second round ads ■ Update web content
Third Quarter 2003	<ul style="list-style-type: none"> ■ Conduct initial program evaluation ■ Modify outreach according to evaluation findings ■ Write, design, print, and mail third round mailers ■ Write, design, and place third round ads ■ Revise lists of statewide and local energy efficiency programs, including targeting expiring and undersubscribed programs ■ Update web content
Fourth Quarter 2003	<ul style="list-style-type: none"> ■ Continue Evaluation ■ Continue to modify outreach according to evaluation findings ■ Write, design, print, and mail fourth round mailers ■ Write, design and place fourth round ads ■ Update web content

Any questions regarding this “Install the Savings: Statewide Mass Market Campaign” proposal or service thereof should be directed to me at the address below.

Energy Solutions appreciates the opportunity, as a non-IOU party, to participate in this mass market proposal solicitation process. We look forward to an opportunity to provide valuable energy efficiency services to the Commission for the benefit of the people of California.

Respectfully submitted,

Ted Pope

Director
Cohen Ventures, Inc.,
DBA Energy Solutions
1738 Excelsior Avenue
Oakland, CA 94602
510-482-8386
ted@energy-solution.com

Dated: December 2, 2002

CERTIFICATE OF SERVICE BY HAND DELIVERY SERVICE

I, the undersigned, state that I am a citizen of the United States and am employed in the City Oakland and County of Alameda; that I am over the age of eighteen (18); and that my business address is: Energy Solutions, 1738 Excelsior Avenue, Oakland, CA 94602.

I am readily familiar with the business practices of Energy Solutions for collection and processing of correspondence for hand delivery service. In the ordinary course of business, correspondence is delivered the same day it is submitted for hand delivery.

On the 2nd day December, 2002, I served one unbound original and six additional true copies of:

“Install the Savings: Statewide Mass Market Campaign” in relation to R 01-08-028

Via hand delivery to the Docket Office.

Additionally, copies were served via email to ALJ Thomas and all parties on the Service List of record on December 2, 2002 (see attachment for list of recipients).

I certify and declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on this 2nd day of December, 2002.

Ted Pope
Director
Cohen Ventures, Inc., dba Energy Solutions

Electronic Service List downloaded from the CPUC on 12/2/02 to which "Install the Savings: Statewide Mass Market Campaign" proposal was sent to comply with electronic service requirements on 12/2/02.

sesco@optonline.net	lmh@eslawfirm.com	mshames@ucan.org
kmccrea@sablaw.com	jtachera@energy.state.ca.us	gsanchez@rhainc.com
mharrigan@ase.org	kmills@cbbf.com	jjensen@rhainc.com
darrell@iwfa.com	mpa@a-klaw.com	jon@vpideas.com
jimross@r-c-s-inc.com	dan@meek.net	ywhiting@sdge.com
richhogan@hotmail.com	bwildman@sbwconsulting.com	jcervantes@sandiego.gov
ed.gieseeking@swgas.com	tom@ucons.com	neilmiller@earthlink.net
wally.kolberg@swgas.com	dws@keywaycorp.com	jsynasio@us-power.com
bridget.branigan@swgas.com	christine.holbrook@csgroup.com	brenda@rer.com
ckmitchell@powernet.net	d.d.gilligan@worldnet.att.net	sthigpen@drintl.com
dnorris@sppc.com	stevef@ensave.com	donpedro1@earthlink.net
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pfeffer@scag.ca.gov	tdavis5128@aol.com	elmoa@cityoftemecula.org
reflectormike@earthlink.net	elsharif@ghpc.org	ogradyj@cityoftemecula.org
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cal.broomhead@sfgov.org	william.dalton@xcelenergy.com	kristine@rhainc.com
marcel@turn.org	dfrey@archenergy.com	abrice@rhainc.com
jes@cpuc.ca.gov	dm@getwise.org	rkeyes@attbi.com
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ted@energy-solution.com	operations@ossonline.com	cmurley@gralegal.com
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